

Education Policy Analysis Archives

Volume 8 Number 24

May 20, 2000

ISSN 1068-2341

A peer-reviewed scholarly electronic journal
Editor: Gene V Glass, College of Education
Arizona State University

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Education Reform in Hong Kong: Issues of Consistency, Connectedness and Culture

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Abstract

Since the early 1990s, the pace of educational reform in Hong Kong has accelerated and broadened to incorporate almost all areas of schooling. The reforms introduced during this period can be subsumed under what has generally been labelled the quality movement. In this paper, we review and comment on a number of policy reform initiatives in the four areas of "Quality Education," English Language Benchmarking, Initial Teacher Training and the Integration of Pupils with Special Needs into Ordinary Classrooms. Following a brief description of each policy initiative, the reforms are discussed in terms of their *consistency*, *coherence* and *cultural fit*.

Since the early 1990s, the pace of educational reform in Hong Kong has accelerated and broadened to incorporate almost all areas of schooling. The reforms introduced during this period can be subsumed under what has generally been labelled the "quality movement." This stands in contrast to reform thrusts in previous decades, which tended to target the quantitative aspects of schooling. The shift from quantity to quality has been driven by at least four interrelated reasons. The first is the successful introduction of nine-year compulsory education in Hong Kong. All students in Hong Kong, regardless of background, are now guaranteed access to schooling to at least Secondary 3 (Grade 9). The second reason has been the growing dissatisfaction from both employers and higher education bodies with student and teacher performance. Related concerns have prompted a search for higher standards and calls for increased accountability. A related argument has been a growing concern for greater economic competitiveness. The third reason has been the perceived need to secure stability and prosperity for all citizens following the change of sovereignty in July 1997. Finally, the quest for quality education in other countries has influenced Hong Kong policy makers and subsequent calls for reform.

In this article, we review and comment on a number of policy reform initiatives introduced in Hong Kong during the 1990s. We do not attempt a thorough review of each policy but rather we set out to describe briefly the initiatives and then analyse them for *consistency*, *connectedness* and *cultural fit*. For the purposes of this paper, *consistency* refers to how the thrust of the reforms and reform components are interpreted. That is, are the reforms consistent, or do they confuse educators through proposing apparently contradictory purposes. *Connectedness* refers to whether reforms or reform components are linked in terms of what they are trying to achieve and how they are achieved. Questions can be asked as to whether the huge array of quality reforms in Hong Kong are coherently connected to each other at the various levels. *Cultural fit* refers to whether the reforms and reform components are appropriate given the unique culture and context of Hong Kong and Hong Kong's educational institutions.

Background to Reform

Soon after assuming office on July 1st, 1997, Tung Chee-wah—the first Chief Executive of the Hong Kong Special Administrative Region of China (HKSAR)—promised an ambitious public spending program, including a massive boost to spending on education. His second policy address in October 1998 included few new initiatives and reiterated the directions established in 1997. The bulk of the policy directives, with the exception of Information Technology, had been in train, to varying degrees, for a number of years.

In 1997, Tung promised expanded investment in basic education through a 7.6% increase in concurrent expenditure and additional capital expenditure of approximately US\$2.8 billion. Increased funding was intended to support a number of what have become continued initiatives. The first group of initiatives targeted directly the promotion of "quality education." This included the establishment of a US\$650 million Quality Education Fund (QEF), a strong move toward School-Based Management (SBM) and a review of the entire education system. Some of these reforms were spelt out in detail in Education Commission Report Number 7 (ECR7) (Education Commission, 1997). The second suite of initiatives focused specifically on improving the quality of teachers. These included requiring all new teachers to acquire degree status, the upgrading of graduate posts in primary schools and the proposed

Teacher Education Reform

Teacher education in Hong Kong up until 1995 was largely the responsibility of four Colleges of Education and an Institute of Language in Education (ILE). These institutions provided non-graduate training courses for both primary and secondary teachers. In 1992, the Education Commission Report No. 5 (ECR5) was released. It recommended three reforms that would impact significantly on education at all levels in Hong Kong. The first was the recommendation of an expansion of tertiary education to provide greater opportunities for graduate teacher training, and the second was an increase in graduate posts in both primary and secondary schools. The third recommendation was to amalgamate the existing colleges and the ILE into a unitary Institute of Education. The mission of the new Hong Kong Institute of Education (HKIED) was to become a centre of excellence in teacher education and continuous professional development. This would be achieved, initially, through the provision of sub-degree courses and later through degree-level courses.

The amalgamation was completed in 1995, and in 1997 staff of the HKIED moved into a new purpose-built facility fully dedicated to teacher education. Following a full institutional review in late 1996, the HKIED was admitted to the governing body of tertiary education in Hong Kong – the University Grants Committee. In November 1997, following the new Chief Executive's address emphasising a commitment to quality education and an all graduate teaching profession, and the release of ECR7, the HKIED had the first of two new teacher education courses validated by the Hong Kong Council for Academic Accreditation. These were a Postgraduate Diploma in Education (PGDE) and a four-year Bachelor of Education (Honours) for primary teachers. The first intakes of degree-level and PGDE students were admitted in September 1998. Currently the HKIED offers 53 courses for 9,500 students and has a staff of 400. The HKIED is an institution born of reform, and as the main teacher education provider in Hong Kong, it continues to reform itself through internal restructuring, the addition of new courses and the upgrading of staff.

The teacher education reform initiative has encountered significant challenges in its implementation and these will be discussed in subsequent sections of the paper. Another reform initiative that continues to create significant debate is the decision to tackle perceived declines in language standards through the compulsory language benchmarking of teachers.

English Language Benchmarking

In late 1995, the Education Commission published Report Number 6 (ECR6) (Education Commission, 1995). This report responded to the concerns expressed by Government, business and educational bodies about declining standards of language skills. The report argues a need for high level language skills among the workforce in Hong Kong, especially as it moves from a manufacturing to a service industry base. ECR6 highlighted a number of areas for action with regard to language standards. Specifically, the report recommended:

The concept of "benchmark" qualifications for all language teachers should be explored by the Advisory Committee on Teacher Education and Qualifications (ACTEQ) with a view to making proposals to the Government as early as possible in 1996.

Minimum language proficiency standards should be specified, which

all teachers (not just teachers of language subjects) should meet before they obtain their initial professional qualification. The standards should be designed to ensure that new teachers are competent to teach through the chosen medium of instruction. (Education Commission, 1995, p.16)

The movement toward benchmark qualifications for all language teachers foretold the new HKSAR Government's quality education agenda—the desire for a fully trained language teaching profession in primary and secondary schools. The benchmark policy initiative would effect all teachers in Hong Kong, not only those who are language teachers of Chinese, English and Putonghua, but also teachers of other subjects who operate in either a Chinese or English language medium. The initiative, by its nature, will, once implemented, directly affect the lives and careers of thousands of people and ultimately the lives of children in Hong Kong schools. Therefore, to ensure quality and representativeness of stakeholders in the process, a great deal of interaction, discussion and consultation was subsequently undertaken with relevant bodies and individuals such as principals, teachers, and other members of the education profession. Other institutional bodies, members of Government, and lay persons in the public, business and commercial sectors were also consulted.

The extensive trialing and piloting of the proposed language benchmarks continues and has been approached from an incremental and phased perspective. The process, which has taken course from late 1996 to the present, has included:

1. A Subject Committee composed of approximately 30 members from tertiary teacher education institutes, teachers and principals and teachers from local schools, as well as members from Education Department and other bodies involved in teacher education in Hong Kong was established. The brief of this committee was to set examination specifications and an examination syllabus.
2. For each of the five test papers, Moderation Committees were set up under the aegis of the Hong Kong Examinations Authority to produce sample material for distribution to teachers.
3. A representative random sample of approximately 400 teachers for English were invited to take part in a pilot assessment exercise so that actual levels of ability might be estimated, in order to compare actual levels of ability with desirable standards recommended by the Subject Committee.

The HKSAR Government's targets for the implementation of benchmarks are that:

- Initial benchmarks for teachers of English language in lower secondary schools should be finalised by mid 1999.
- Benchmarks as exit standards in the Teacher Education institutions are expected to be implemented by 2000—2001.
- All serving language teachers should be benchmarked by 2005, and all teachers who teach through the medium of English or Chinese should be benchmarked by 2008.

The proposed benchmark initiative, if successfully implemented, will have a profound effect on the teaching profession in Hong Kong. It remains, however, to be a very contentious issue.

Integration Reform

The policy shift from special school placement toward the integration of disabled students into mainstream classrooms began in 1986. However, despite recommendations concerning the re-skilling of regular teachers for supporting students with learning needs, minimal implementation followed. In response to concern from parents of disabled students, the ED recommended that a study be made of how integration might best be achieved. In addition, The Board of Education (1997) noted that regular primary classrooms contain significant numbers of students who are experiencing difficulty in learning and that this trend would continue in the future.

Whether the needs of these children will be fully met, and whether teachers are adequately trained to meet their needs, are issues that continue to be debated. Recommendations have been made that course providers in Special Education work toward improving the course content and structure of programmes designed for Special Education teachers and that Special Education be strengthened in initial teacher education programmes (Board of Education, 1996).

The 1997 Report on the Review of 9-year Compulsory Education specifically identified three major areas of concern that involve meeting the needs of students with special educational needs in regular classrooms. These deal with the range of individual differences, behavioural problems, and learning differences. Other indicators of the need for broader training in special education have emerged from seminars and workshops run by the Professional Teachers' Union. These meetings have given rise to the development of papers that have been submitted to the Education Department suggesting that regular class teachers must be adequately prepared to work effectively with low achieving students. Finally, Wilson (1997) raises the issue of gifted and talented students in Hong Kong. He suggests that catering for these students will help them achieve their potential, and benefit society.

Consistency, connectedness and cultural fit

Though the reforms briefly discussed are considered, on the whole, progressive, a number of interrelated issues can be raised in relation to their implementation and acceptance at an organisational level. We now analyse the policies in terms of their *consistency*, *connectedness* and *cultural fit*. These frames are defined below. The analysis will touch upon certain parts of the policies only.

Consistency refers to how people interpret the thrust of the reforms and reform components or whether they in fact confuse educators through proposing apparently contradictory purposes. Questions asked include: Are the thrusts of the reforms consistent? That is, do they send contradictory meanings to those charged with implementing the reforms in their organisations?

Connectedness refers to whether the reforms or reform components are linked in terms of what they are trying to achieve and how they are achieved. Questions can be asked about whether the huge array of quality reforms are connected to each other coherently at various levels: Are the thrusts of the reforms coherent? That is, are the reforms purposefully linked to each other?

Cultural fit refers to whether the reforms and reform components are appropriate given the unique culture and context of Hong Kong and Hong Kong's educational institutions. The questions guiding this frame include: Are the thrusts of the reforms culturally appropriate? That is, are the

reforms in their present forms appropriate for the Hong Kong culture and context?

Consistency in School Management

The reforms proposed in ECR7 do not present an overly consistent picture. This is reflected within and between a number of other reforms. For example, one form of inconsistency for educators in schools is between the simultaneous demand for internally driven improvement—agendas supposedly decided upon by the school to meet its unique needs—and externally driven demands for accountability. One example can be drawn from the ECR7 policy document. It states: "In proposing ways to improve the quality of school education, we consider some common standards and measures necessary. However, we are mindful to avoid uniformity which may overly restrict or restrain schools from developing their own characteristics" (p. 6). The tension between these dual aims becomes even more pronounced in other sections of the document. The example below illustrates pressures for diversity in Hong Kong schools arising from ECR7.

School education in a modern society should be pluralistic. We should allow schools to pursue their own goals and improve performance in different domains with a variety of approaches. To involve teachers, parents and students in school management is conducive to the development of quality school education. This will not only help balanced development of students and gain the support of parents, but also enable the school to collate effectively views of teachers. (p 17)

In the same document are equally strong requirements for accountability and for conformity. In their pursuit of quality education, the ED proposes the adoption of a "whole-school approach" to inspections, which calls on an external panel of "experts" to evaluate the performance of schools. In order to build a quality culture in schools, a number of measures must be taken. They include:

- setting clear and commonly accepted goals for school education and having these goals clearly understood by all players in the school system;
- translating the goals into achievable, observable and measurable quality indicators;
- developing indicators for assessing school aims and using these indicators as the basis for school plans and external assessment. (pp. 7-8)

The issue then is not one of whether quality assurance programs are necessary, but that schools are often confused by inconsistent system pressures calling for both individual action and direction and imposed accountability. An unintended outcome of regulatory mechanisms, such as quality assurance, may be a tendency toward risk avoidance and orthodoxy in many schools which, in turn, can detract for other facets of the reform.

Consistency in Teacher Education

Internal and external pressures have fuelled the rapid and dynamic pace of teacher education reform. During the 1990's there were significant changes in the Directorate of

the HKIEd resulting in the almost totally restructuring of the organisation. Similarly, the change in Government of Hong Kong brought with it a fresh emphasis on improving education, in particular the hastened call for an all-graduate teaching force.

The result has been an inconsistency in the way HKIEd staff behave and respond to reforms based on ideological differences about the nature of graduate-level academic study. Within the HKIEd a tension existed, more notably during the initial development of degree-level courses between what can be loosely described as academic rationalists and social-constructivist educators. Academic rationalists placed emphasis on ownership of subject content, focus the teaching content on the development of subject knowledge and more summative modes of assessment. Academic rigour and the desire for external accountability were seen to drive these lines of thinking. However, social constructivist educators placed greater emphasis on the integration of subject knowledge, pedagogical knowledge and teaching methods. The modes of assessment used reflected similar integration and a greater emphasis on process than product. The tensions were amplified by a lack of direction and inconsistent feedback through reports from Government about the preferred qualities of Hong Kong teachers and, to some extent, by the background experiences of staff.

Consistency in English Language Benchmarking

It has been mentioned above that the benchmark initiative deals with three languages—English, Chinese and Putonghua. Standards should therefore be consistent across the three languages. There has been a considerable difference in approaches to the benchmarks for the three languages in terms of philosophy and well as in the approach to marking. For example, with reference to marking, it needs to be considered whether the approach should be from the positive viewpoint of "can do" skills, as opposed to penalising a teacher for errors and failing someone after a certain number of errors have been made.

One issue that has aroused great controversy in the local media focuses on who should be benchmarked. The initial thrust of the benchmarking exercise focused on establishing benchmarks for lower secondary school teachers of English language, for Chinese as a medium of instruction in primary schools and Putonghua as a foreign language in secondary schools. If the Government's claim that teacher standards in language ability form a cornerstone in the upgrading of education, it is crucial that the exercise not stop at this initial cohort of teachers but continue to examine teachers and teacher educators across all sectors of education.

It has been agreed by many sectors of education that benchmarks should be introduced for teachers in pre-service training. What is less clear is the extent to which the policy will be implemented for in-service teachers. As might be expected, there is considerable opposition from serving teachers (with marked pressure from the Professional Teachers' Union) who state that serving teachers have already been certified and therefore do not need to be "re-certified."

A further case concerns exemptions in terms of whether – or indeed *should*—any teacher(s) be exempted in terms of qualifications, background or age. This is a very contentious issue, as exemptions need to be examined on a case-by-case basis.

Raising standards requires a substantial financial commitment. On this basis, it must be stated that the HKSAR Government is being consistent in its approach to the upgrading of education. It realises that it cannot be done on the cheap. Recurrent resources have been set aside (some US\$100 million for the period 2000 to 2008), so that language courses are available for every teacher in Hong Kong (there are

approximately 50,000 teachers across the different educational strata in Hong Kong). It is expected that these teachers will want to enrol on such courses.

Consistency in Integration in Special Education

Arguably one of the most glaring inconsistencies in integration is the practice of integrating disabled students into regular schools by placing them in special classrooms within the schools. This is at odds with a recent equal opportunity ordinance aimed at eliminating discrimination against the disabled (Disability Discrimination Ordinance, 1998). There are further problems of inconsistency between policy and its interpretation. For example, *inclusion* has been called "integration," "mainstreaming" and "normalisation," and schools have interpreted each of these terms differently. Another inconsistency stems from a mis-transference from small-scale research findings to larger scale implementation.

Connectedness in School Management

Many of the reforms in Hong Kong have been driven by different educational, political, economic and social agendas. Some policies, such as the Target Oriented Curriculum (TOC) and the SMI were introduced during British rule as a means of democratising education. Others were introduced to smooth the change of sovereignty and yet other to address political calls for an increase in standards. Often, these reforms have been simply stacked on top each other with little consideration of how they support or relate to each other.

As an example, consider ECR7 and the Target Oriented Curriculum—the major school curriculum reform vehicle. TOC is directed at teachers in the classroom while ERC7 largely provides administrative, organisational and structural strategies for school reform. ECR7's effects are felt mostly at the whole-school and department levels rather than at individual teacher and classroom level. If school performance is most directly affected by quality teaching, learning and curricula, then ECR7, with its focus on management and governance, stops short of penetrating to the classroom-teacher level. It then becomes an act of faith to believe that SBM will necessarily transform the variables, which directly impact on school performance—namely, the cognition and behaviours of teachers and students in classrooms. ECR7 uses the core concept of school culture but offers little on how to build such cultures to promote quality teaching, learning and curricula.

TOC, on the other hand, aims to influence student learning at the classroom level and neglects the organisational level. TOC is not even mentioned in the ECR7 document. Therefore, the question is whether policy makers have considered the linkages—how the reforms support each other—between these two key areas? The answer appears to be "no." Both reforms are perceived as discrete entities, the former seen as the business of principals and senior teachers, the latter, the concern of classroom teachers. Both reforms need to be considered as an integral whole and all stakeholders need an appreciation and understanding of how they can best enhance student learning and school performance (Dimmock & Walker, 1998a).

Connectedness in Teacher Education

One cited reason behind the teacher education reform initiatives was the perceived

need for teachers to cope with an increased range of curriculum reforms. However, teachers and teacher educators have struggled with these reform policy initiatives because of a lack of connectedness between them. For example, the relationship between TOC, integration, and benchmarking, at a macro and micro level has not been made clear. Reform guidelines lack detail or stated expectations, and therefore individuals within the education community including teacher educators are forced to second guess the exact nature of the reform and how it may or may not connect with other reforms.

Within the HKIEd this has led in some cases to significant differences in understandings about the reform intent and in respect to responsibility for developing reform related materials. The result has been confusion and conflict about the effect of reform implementation at both the tertiary and school levels.

Connectedness in Benchmarking

We have discussed the issue of improving education through the perspective of upgrading teacher professionalism. While language is important, it is only one aspect of an able teacher, however. Holistically, one aspect of connectedness can be perceived from the declaration (HKSAR Chief Executive's Policy Address, 1997) that the teaching profession will move to an all-graduate profession, and that, from 2004, all teachers in secondary schools will need to hold a Postgraduate Diploma in Education (PGDE) in order to be able to work in schools – which is not currently the case. However, in terms of benchmarking, there is a perceived lack of connectedness between the design, development and test specifications of the benchmarks for the three languages (English, Chinese and Putonghua).

Connectedness in Integration

Current integration reform finds itself in competition with several other reforms simultaneously foisted onto schools. For example, under SBM, schools can make decisions about meeting their own needs and priorities. While this suggests that integration might be more readily achieved, the reality of the situation is that due to the vicissitudes of school examination results, when given a choice, schools will give priority to reforms which result in improved examination results—at the expense of integration. Many schools fail to perceive the connectedness between integration and other reforms. While this can be partly blamed on the unwillingness of schools to include students with special education and learning needs, ED has an obvious duty to connect with schools through communication and develop firmer bonds to counter this problem.

Culture in School Management

The final issue relates to the cultural applicability of educational reforms in Hong Kong. Reforms such as ECR7 are driven very much by global educational trends. For example, ECR7 is reflective of School-Based Management policies emanating from Western English-speaking countries. Given Hong Kong's status as a "colony" until very recently, the importation of the educational reform agenda is perhaps not surprising. Nonetheless, the phenomenon of exporting reforms from societies and importing them into others whose characteristics, values and conditions are different raises concerns about their cultural appropriateness.

While Hong Kong people display many characteristics of "Westernisation," the underpinning culture is very much Hong Kong Chinese. Among the questions this poses in regard to educational reform are the following:—to what extent are British, American and Australian policy blueprints appropriate to meet the educational needs of Hong Kong? For non-western societies, are there more appropriate alternatives to SBM and to curriculum reforms driven by student-centred approaches and learning outcomes? If there are not, then what, if any, adaptations to imported Western policies are needed? This is particularly relevant at the point of school implementation. These issues do not appear to have been seriously considered by policy makers but certainly must be dealt with continually at the school level (Dimmock & Walker, 1998b).

Culture in Teacher Education

The flow-on effect of educational reform in Hong Kong during the 1990's has resulted in significant changes to the preparation of teachers. The decision to create the HKIEd has placed teacher education under the microscope, and increased attention on the quality of teacher educators. Many staff at the HKIEd feel they have been forced to join a university-type culture in which their experience, qualifications and professional practices are not valued. Staff are required to attain higher degrees, including doctorates, undertake research, publish in internationally recognised journals, undertake teaching attachments in local schools, and update the depth and breadth of their subject knowledge, teaching content and assessment practices. These changes are not out of the ordinary for many university-based teacher educators. However, for many staff, their origins and experience lay in sub-degree granting institutions, where the emphasis and expectations were somewhat different.

The shift to a university culture and associated work practices has resulted in significant tension within the institution. The emphasis on greater public accountability, staff appraisal, promotion and substantiation based increasingly on an individual's ability to conform to the shift in work culture, has resulted in the loss of experienced staff.

Culture and Benchmarking

The perspective of culture may be viewed from two angles. First, from the perspective of what might be termed "respect," the introduction of benchmarking will inevitably mean that teachers may risk a possible loss of standing. Having to sit an external test such as the benchmark test to prove their worth may mean a possible loss of face, certainly if they were to fail. Second, in many older, more established and traditional schools, a teacher is often regarded as a "sage." While it is acceptable for teachers to foist tests on their students and to make their students aware of their shortcomings, the possibility of being afforded the same treatment is creating some concern.

This also links to the perspective of an "exam culture." Hong Kong is a very exam-oriented society, where teachers frequently apply various benchmarks to their students' performance. However, when teachers themselves are subjected to a benchmark test in front of a live class, this puts a different face to the benchmark assessment. Teachers are apprehensive about the spread of the benchmark culture to include an assessment of own language ability.

Culture and Integration

As with other policy initiatives, integration reform has, in general, come from a Western perspective. Within schools, there are a number of potential cultural impediments. First, most schools are driven by the need to achieve highly in public examinations. Any threat to such achievement may result in open resistance to integration. Second, there is also a tendency for teachers to gear their teaching to the average achievers and ignore those who experience difficulty in learning.

Both these aspects strike at the heart of integration. There is little evidence of the Hong Kong Education Commission's 21st century blueprint push toward "...help (for) all its students whatever their ability..." The Hong Kong school culture is further characterised by curriculum rigidity. The need to teach to the examination is pervasive. Sometimes such rigidity is manifested by excessive adherence to the curriculum, or an outdated style of teaching. Disabled students need flexibility in what and how things are done. Cultures have differing attitudes toward disablement, and in some instances those who are different, may not be highly valued. It is only by education and supported exposure to disabled students that schools and personnel become less resistant to change. There is comfort in the status quo, usually set by the dominant culture, in this case, so called "normal people." The cultural status quo is maintained by the omission of disabled students from regular schools, and by their grouping into categorical special schools.

Conclusion

Issues of consistency, coherence and culture have led many within the educational community to become cynical about the "real" effects of educational reforms. Despite the noble purpose of many of the reforms, such cynicism, if left unchecked, has the potential to further damage the efficacy and influence of the reforms at the level where they are intended to make a difference—at a school and classroom level. It is to be hoped that due consideration of the factors involved in reform implementation will lead to more positive and effective changes in the quality of education in Hong Kong.

As with most contexts, Hong Kong policy makers are continually making reforms. This is evident in Hong Kong, as Education Commission Report, No. 8 (ECR8) (Education Commission, 1999) is released with the publication of this paper. ECR8 proposes wide-ranging reforms to the Hong Kong educational system at kindergarten, elementary, secondary and tertiary levels of the educational system, and moots reforms which will serve to accentuate the issues of *consistency*, *coherence* and *culture discussed in this article*.

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